



FORM 1096

Understanding IRS Form 1096
Annual Summary and Transmittal of
U.S. Information Returns



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WHAT IS FORM 1096?

Form 1096, Annual Summary and Transmittal of U.S. Information Returns, is used as a “cover sheet” to various types of other forms only when submitting a paper filing to the IRS. It also serves as a summary of the information being filed.

Use Form 1096 to transmit paper Forms 1097, 1098, 1099, 3921, 3922, 5498, and W-2G to the Internal Revenue Service.

WHEN IS FORM 1096 USED?

IRS Form 1096 is only required when submitting a paper filing to the IRS with the supporting form type forms.

You do not need to include a Form 1096 when E-filing. One of the advantages of using an approved IRS transmitter is they will be able to generate Form 1096 for your business without using a physical form.

Using the e-Filing system is encouraged for faster results and saves you a step since this form is not filled out when being transmitted to the IRS.

WHAT ARE THE DEADLINES FOR FORM 1096?

Traditionally the 1099 deadlines are as follows:

Form Type	Paper Filing Deadline
Form 1099-NEC	January 31 st
Forms 1097, 1098, 1099 (excluding NEC), 3921, 3922, and W-2G	February 28 th
Form 5498	May 31 st

If these deadlines fall on a weekend or legal holiday, then the due date is typically the following business day.

IS THERE A MAXIMUM FORM COUNT FOR PAPER FILING?

Yes, the paper filing threshold form count is an aggregate of 10 forms. Filers must find the sum of the following form types to determine if they must e-file:

- Form 1042-S
- Form 1098
- Form 1098-T
- Form 5498 series
- Form 1095-B
- Form 1098-C
- Form 1099 series
- Form 8027
- Form 1095-C
- Form 1098-E
- Form 3921
- Forms W-2
- Form 1097-BTC
- Form 1098-Q
- Form 3922
- Form W-2G

If a filer has 10 or more of these forms **total**, then they must electronically file.

WHERE TO MAIL 1096 PAPER FILING?

Make sure to include a transmittal Form 1096 when choosing to paper file and only include Copy A of the Forms.

Filers should use their address to determine where to mail their filing. The graphic below outlines the appropriate mailing addresses.

MAIL IN 1096 & 1099 BY STATE

Internal Revenue Service
Austin Submission Processing Center
P.O. Box 149213
Austin, TX 78714

- Alabama
- Arizona
- Arkansas
- Delaware
- Florida
- Georgia
- Kentucky
- Maine
- Massachusetts
- Mississippi
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- Ohio
- Texas
- Vermont
- Virginia

Department of the Treasury
IRS Submission Processing Center
P.O. Box 219256
Kansas City, MO 64121-9256

- Alaska
- Colorado
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Michigan
- Minnesota
- Missouri
- Montana
- Nebraska
- North Dakota
- Oklahoma
- Oregon
- South Carolina
- South Dakota
- Tennessee
- Utah
- Washington
- Wisconsin
- Wyoming

Department of the Treasury
IRS Submission Processing Center
1973 North Rulon White Blvd.
Ogden, UT 84201

- California
- Connecticut
- Washington, D.C.
- Louisiana
- Maryland
- Pennsylvania
- Rhode Island
- West Virginia

Internal Revenue Service
Austin Submission Processing Center
P.O. Box 149213
Austin, TX 78714

If your legal residence or principal place of business or principal office or agency is outside the United States, file with this address.

Import Data in Your Format

Support for Popular Payroll Providers

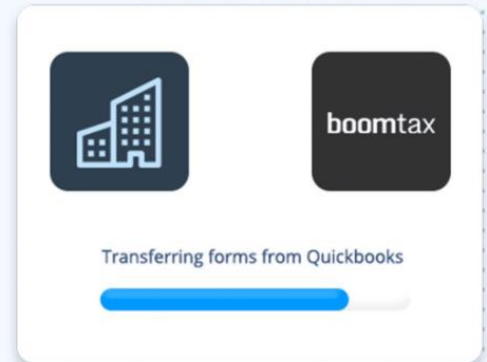
We support data imports from ADP, Sage, UltiPro, Insperity and we are continually adding new formats.

We Support Quickbooks Online

Import your data directly from QBO.

Upload Your IRS Files Directly to Us

Simply drag and drop your IRS ACA files into BoomTax and be ready to file in 5 minutes or less!



Recipient Copies Made Easy

Print & Mail Service

We can print, fold, stuff, affix postage and mail all of your forms for you from a HIPAA compliant facility.

E-Delivery

Electronic consent and delivery that meets IRS guidelines.

Self Service Print & Mail

Print mailable PDFs from your own printer.

NAME / EMAIL	STATUS
Jane Cooper jane.cooper@example.com	Mailed
Kristin Watson kristin@company.com	Mailed
Tom Cook tom.cook@company.com	E-Delivered

Hands Off E-Filing

No Training Needed

Simply click 'E-file' on your filing and we will take care of the rest.

We Keep You in the Loop

We constantly check on the status of your filing and we send you email updates as your filing is processed.

Free Unlimited Corrections

We offer free unlimited corrections for all filings.

OA	Oceanic Airlines Mountain View, CA	Accepted
SC	Sterling Cooper Austin, TX	Accepted
BM	Black Mesa Redmond, WA	Accepted
RE	Rand Enterprises Phoenix, AZ	Accepted



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